



ORS Membership Voice Survey

Your experience matters.

The City of San José Office of Retirement Services (ORS) invites members, retirees, beneficiaries, and separated members to share your experience with our services, communications, tools, and retirement information. This is ORS's first survey of its kind, and what you tell us will shape how we serve you.

Your responses are anonymous. ORS and the Boards of Administration will review responses together with those of other members and will not know who provided any individual response.

Some questions may not apply to you. If so, please skip.

The survey takes about 5 minutes. Some questions are required, marked with an asterisk; all others are optional.

Questions? Contact ORS at (408) 794-1000 or Retirement.Dept@sanjoseca.gov.

Thank you for helping us serve you better.

Questions

* 1. Overall, how satisfied are you with your experience with ORS?

- ☐ Very satisfied
- ☐ Satisfied
- ☐ Neutral
- ☐ Dissatisfied
- ☐ Very dissatisfied
- ☐ Not experienced or not applicable

* 2. What is the main reason for your rating?

3. How confident are you that ORS will administer your benefit accurately and on time?

- ☐ Very confident
- ☐ Confident
- ☐ Neutral
- ☐ Not very confident
- ☐ Not at all confident

4. The last time you contacted ORS with a question, what happened?

- ☐ It was resolved during that first contact
- ☐ It was resolved, but it took more than one contact
- ☐ It was not resolved
- ☐ I do not recall
- ☐ I have not contacted ORS

**5. In the past twelve months, which of the following have you used to get information from ORS or to contact ORS?
(Choose all that apply)**

- ☐ ORS website
- ☐ MemberDirect (online member portal)
- ☐ Retiree healthcare enrollment website, if applicable
- ☐ Telephone
- ☐ Email
- ☐ Secure Chat
- ☐ Office visit or appointment
- ☐ Printed newsletter
- ☐ Email newsletter PDF (current)
- ☐ Facebook
- ☐ X (formerly Twitter)
- ☐ Letters from ORS
- ☐ Other (please specify)

- ☐ I have not used any of these in the past twelve months

6. Which of the following are you aware that ORS offers?

(Choose all that apply)

- ☐ MemberDirect (online member portal)
- ☐ Individual appointments with ORS staff
- ☐ The ORS newsletter
- ☐ Assistance with retiree healthcare enrollment
- ☐ Direct deposit and tax withholding changes
- ☐ Beneficiary designation updates
- ☐ Other (please specify)

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7. Thinking about the times you have contacted ORS, how satisfied are you with each of the following?

[illegible]

8. How satisfied are you with the following?

	Very satisfied	Satisfied	Neutral	Dissatisfied	Very dissatisfied	Not experienced or not applicable
Clarity and usefulness of written information from ORS	☐	☐	☐	☐	☐	☐
Ease of finding information on the ORS website	☐	☐	☐	☐	☐	☐
Ease of using MemberDirect, if you have used it	☐	☐	☐	☐	☐	☐
Knowing whether to contact ORS or the City for a particular question	☐	☐	☐	☐	☐	☐
Information about retiree healthcare enrollment and where to go with healthcare questions	☐	☐	☐	☐	☐	☐

9. How would you prefer ORS to communicate information with you? (Choose all that apply)

- ☐ Printed newsletter
- ☐ Email newsletter PDF (current)
- ☐ Email news highlights with links to full articles
- ☐ ORS website
- ☐ MemberDirect (online member portal)
- ☐ Social media
- ☐ Printed letters for important items
- ☐ No preference
- ☐ Other (please specify)

**10. Which two areas would most improve your experience with ORS?
(Choose up to two)**

- ☐ A timely response when I contact ORS
- ☐ Clearer written information
- ☐ Easier to find information on the ORS website
- ☐ Knowing what steps to take, when to take them, and the status of my request
- ☐ Information about benefit payments or future retirement eligibility
- ☐ Information about retiree healthcare enrollment, if applicable
- ☐ More transactions available in MemberDirect
- ☐ Easier access to help by telephone or in person
- ☐ Other (please specify)

11. How often would you like to receive general retirement information from ORS?

- ☐ Monthly
- ☐ Quarterly
- ☐ Twice a year
- ☐ Once a year
- ☐ Only important news or items requiring action
- ☐ No preference

12. Have you used MemberDirect, the ORS online member portal?

- ☐ Yes
- ☐ No
- ☐ I am not sure

**13. What has kept you from using MemberDirect (online member portal)?
(Choose all that apply)**

- ☐ I did not know it was available
- ☐ I have not needed it
- ☐ I had difficulty registering or receiving my PIN
- ☐ I had difficulty signing in or resetting my password
- ☐ The two-step verification process was difficult
- ☐ I could not find what I needed once signed in
- ☐ I prefer to call, email, or visit ORS
- ☐ Other (please specify)

14. When you need help from ORS, which do you prefer?

- ☐ ORS Website
- ☐ MemberDirect (online member portal)
- ☐ Telephone
- ☐ In-office appointment
- ☐ A combination of these
- ☐ No preference

15. Which MemberDirect features are or would be most useful to you?
(Choose all that apply)

- ☐ Benefit payment information and pay advices
- ☐ Benefit payment documents and tax forms
- ☐ Updating Direct deposit information
- ☐ Updating Tax withholding
- ☐ Updating contact information
- ☐ Secure document upload
- ☐ Secure messages with ORS
- ☐ Status tracking for a request
- ☐ Appointment Scheduling
- ☐ Retiree healthcare information, if applicable
- ☐ Other (please specify)

**16. Which topics would you most like to understand better?
(Choose all that apply)**

- ☐ Staying connected with ORS and updating my contact information
- ☐ Benefit payment information and timing
- ☐ Tax withholding and tax forms
- ☐ Direct deposit
- ☐ Retiree healthcare enrollment, if applicable
- ☐ MemberDirect (online member portal)
- ☐ How to contact ORS
- ☐ Family status changes
- ☐ Cost-of-Living Adjustment (COLA)
- ☐ Power of Attorney (POA)
- ☐ IRC 415(b) Benefit Limits
- ☐ Other (please specify)

**17. How would you prefer to receive retirement education?
(Choose all that apply)**

- ☐ In-person sessions
- ☐ Live webinars
- ☐ Recorded webinars or videos
- ☐ Written guides
- ☐ Website articles
- ☐ One-on-one appointments
- ☐ Other (please specify)

*** 18. What is one thing ORS could do to improve your experience?**